

**Form 320WA
NW Natural Washington Incentive Application—Universal Form
Existing Homes**



To be completed by Participant and Trade Ally Contractor or other Contractor

Conservation Services Group (CSG) is a Program Management Contractor for Energy Trust of Oregon, Inc.

Program Use Only

FastTrack ID	Project Type
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Please read this form carefully and provide all specified information. Signatures required on page 6.

The Existing Homes program must receive applications within 90 days from the date of installation. All information must be completed for processing, incomplete information will result in delayed payment of the incentive. Incentive offers are subject to funding availability and may change.

How did you hear about Energy Trust? (select one)			From whom did you hear about Energy Trust? (select one)		
<input type="checkbox"/> Email	<input type="checkbox"/> Web/Online	<input type="checkbox"/> Other	<input type="checkbox"/> Contractor	<input type="checkbox"/> NW Natural	<input type="checkbox"/> Real Estate Agent
<input type="checkbox"/> Event	<input type="checkbox"/> Utility Bill	<input type="checkbox"/> Don't Know	<input type="checkbox"/> Energy Trust	<input type="checkbox"/> Cascade Natural Gas	<input type="checkbox"/> Other
<input type="checkbox"/> Mail	<input type="checkbox"/> Referral		<input type="checkbox"/> PGE	<input type="checkbox"/> Friend/Family	<input type="checkbox"/> Don't Know
<input type="checkbox"/> News	<input type="checkbox"/> Advertisement		<input type="checkbox"/> Pacific Power		
If Other:			If Real Estate Agent, please specify name:		

Participant Information (All information is required to process incentive for payment.)

Participant Name		Install Date	
Site Address	City	State	Zip
Mailing Address, (for payment)	City	State	Zip
Telephone <input type="checkbox"/> Home <input type="checkbox"/> Cell <input type="checkbox"/> Office	Alt. Telephone		<input type="checkbox"/> Home <input type="checkbox"/> Cell <input type="checkbox"/> Office
Email	County		
Participant Type <input type="checkbox"/> Homeowner <input type="checkbox"/> Property Owner or Manager	Occupancy <input type="checkbox"/> Owner <input type="checkbox"/> Tenant		
Is this property used for rental income? <input type="checkbox"/> Yes <input type="checkbox"/> No	If you checked Yes , a W-9 is required for payment. Please call 1.866.368.7878 for more information, or go to www.irs.gov .		

Utility Information (Please check the box for all service utilities)

<input type="checkbox"/> NW Natural	<input type="checkbox"/> Other Gas Utility (please specify)
<input type="checkbox"/> Electric Utility (please specify)	

Site Information

Year Built	Square Feet	Number of Levels
Primary Heating System	Fuel (select one)	
	<input type="checkbox"/> Electric <input type="checkbox"/> Gas <input type="checkbox"/> Propane <input type="checkbox"/> Other _____	
	System Type (select one)	
	<input type="checkbox"/> Baseboard <input type="checkbox"/> Furnace <input type="checkbox"/> Heat Pump <input type="checkbox"/> Space Heater <input type="checkbox"/> Other _____	
Furnace Details	Is furnace being upgraded at this time? <input type="checkbox"/> Yes <input type="checkbox"/> No	Has furnace been upgraded in the last year? <input type="checkbox"/> Yes <input type="checkbox"/> No

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Site Information Continued

Ducted Forced Air System <input type="checkbox"/> Yes <input type="checkbox"/> No	Cooling <input type="checkbox"/> Central A/C <input type="checkbox"/> Room A/C	<input type="checkbox"/> Heat Pump <input type="checkbox"/> None
Water Heater Fuel <input type="checkbox"/> Electric <input type="checkbox"/> Gas <input type="checkbox"/> Propane <input type="checkbox"/> Other _____	Water Heater Capacity _____ Gallons	<input type="checkbox"/> Tankless
Basement <input type="checkbox"/> Crawlspace unimproved <input type="checkbox"/> Crawlspace with vapor barrier	<input type="checkbox"/> Full basement <input type="checkbox"/> Garage/ basement combo	<input type="checkbox"/> Half basement <input type="checkbox"/> Slab on grade <input type="checkbox"/> None <input type="checkbox"/> Other

Attic, Floor and Wall Insulation Incentives

	Installed Cost	Beginning R-Value ¹	Ending R-Value ²	Square Feet	Incentive Requested	Maximum Incentive
<input type="checkbox"/> Attic Insulation	\$	R-	R-			\$0.25 per square foot not to exceed cost
<input type="checkbox"/> Knee Wall Insulation	\$	R-	R-			\$0.30 per square foot not to exceed cost
<input type="checkbox"/> Floor Insulation	\$	R-	R-			\$0.30 per square foot not to exceed cost
<input type="checkbox"/> Wall Insulation	\$	R-	R-			\$0.30 per square foot not to exceed cost
<input type="checkbox"/> Rim Joist Insulation	\$	R-	R-			\$0.30 per square foot not to exceed cost
<input type="checkbox"/> Boiler Pipe Insulation	\$	R-	R-	linear ft		\$0.50 per linear foot not to exceed cost
<input type="checkbox"/> Duct Insulation*	\$	R-	R-	linear ft		50% of cost, up to \$100

*If you checked duct insulation above, you must select one of the options below

Prescriptive Duct Sealing completed prior to duct insulation **OR** PTCS Duct Sealing completed prior to duct insulation.

¹ R-value describes the capacity of a material to resist heat transfer. The higher the R-value of a material, the greater the insulating properties. Must meet beginning R-value requirements.

² Must meet required ending R-Value requirements, and/or cavity must be filled.

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Windows

	Installed Cost	U-Value ³	Square Feet	Total Number of Windows Installed	Incentive Requested	Maximum Incentive ⁴
<input type="checkbox"/> Windows	\$	U-				\$2.25 or \$3.50 per square foot not to exceed cost

Acceptable proof of window size and U-Value required; please select one from each column

<p>Window Size</p> <p><input type="checkbox"/> Invoice from manufacturer, distributor, retailer or contractor</p> <p><input type="checkbox"/> Windows Addendum</p>	<p>Window U-Value</p> <p><input type="checkbox"/> Copy of NFRC sticker for each window installed</p>
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Air Leakage Test:

Blower Door test required; \$35 per home tested. Air testing and sealing work must be performed by a qualified trade ally contractor of Energy Trust of Oregon with performance testing certification

Pre CFM ₅₀ _____	Pre-VP: _____	Test Cost \$
<p>If test in only, identify reasons:</p> <p><input type="checkbox"/> Air leakage pre-test determined that the MVL prohibited air sealing</p> <p><input type="checkbox"/> Participant declined air sealing</p> <p><input type="checkbox"/> Contractor made a reasonable effort to seal the house, but was unable to meet the minimum reduction standards</p> <p><input type="checkbox"/> Other: _____</p>		

<p>Minimum Ventilation Level Measurement <i>(required before performing air sealing on all homes)</i></p>	<p>Ventilation Potential = CFM₅₀ / N If MVL is greater than Ventilation Potential, Mechanical Ventilation is required.</p>	
<p><input type="checkbox"/> MVL based on known occupancy _____ occupants x 15 CFM = _____</p>	<p><input type="checkbox"/> MVL based on number of bedrooms (_____ bedrooms + 1) x 15 CFM = _____</p>	<p><input type="checkbox"/> MVL based on ACH_{nat} and volume (.35 ACH_{nat} x _____ volume) / 60 = _____</p>
Blower Door Location _____		Blower Door Make _____
<p>Ventilation System <i>*if approved mechanical ventilation strategy exists, MVL threshold may be waived</i> NOTE: incentives will not be paid on a project when the MVL is greater than ventilation potential, unless an approved mechanical ventilation strategy exists.</p>		<p><input type="checkbox"/> Continuous rated fan with programmable timer</p> <p><input type="checkbox"/> Mechanical damper with 24 hr timer</p> <p><input type="checkbox"/> Other</p>
<p><input type="checkbox"/> Participant was given notification of the MVL of the unit</p>		

³ U-Value describes the heat conductivity of a material. The lower the U-Value, the greater the insulating characteristics of the material.
⁴ Windows with a U-Value of 0.26 to 0.30 are eligible for \$2.25 per sq. ft. Windows with a U-Value of 0.25 or less are eligible for \$3.50 per sq. ft.

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Air Sealing:

Blower Door test required; 50% of cost, up to \$275 per gas heated residence. Minimum 300 CFM₅₀ reduction required. If final measurement is below MVL, mechanical ventilation is required. Air testing and sealing work must be performed by a qualified trade ally contractor of Energy Trust of Oregon with performance testing certification

Pre CFM ₅₀ _____	Pre-VP: _____	Sealing Cost \$
Post CFM ₅₀ _____	Post-VP: _____	
Leakage Reduction _____	Mechanically Ventilated <input type="checkbox"/> Yes <input type="checkbox"/> No	
Air Sealing Target Areas		
Check area(s) where air sealing was performed		
Attic:	<input type="checkbox"/> Chases <input type="checkbox"/> Chimney/Flue	<input type="checkbox"/> Access Doors <input type="checkbox"/> Top Plates
Knee Walls:	<input type="checkbox"/> Joist Cavities <input type="checkbox"/> Built-ins	<input type="checkbox"/> Access Doors <input type="checkbox"/> Hatches
Band Joist:	<input type="checkbox"/> Between Floors <input type="checkbox"/> Plumbing	<input type="checkbox"/> Basement <input type="checkbox"/> Electrical
Exterior Walls:	<input type="checkbox"/> Chimney <input type="checkbox"/> Penetrations	<input type="checkbox"/> Baseboards <input type="checkbox"/> Sill Plates
Under Floors/Crawl:	<input type="checkbox"/> Chases <input type="checkbox"/> Plumbing	<input type="checkbox"/> Access Doors <input type="checkbox"/> Electrical
Windows and Doors:	<input type="checkbox"/> Window trim <input type="checkbox"/> Weather stripping	<input type="checkbox"/> Door Sweeps <input type="checkbox"/> Basement Windows
Please list other area(s), if applicable: _____		

Duct Leakage Test:

Duct test required; \$35 per duct system tested; work must be installed by PTCS certified technician. PTCS form must be attached.

Pre CFM ₅₀ _____	Test Cost \$
If test in only, identify reasons:	
<input type="checkbox"/> Participant declined duct sealing <input type="checkbox"/> Duct Leakage pre-test was less than 300 CFM ₅₀ <input type="checkbox"/> Contractor made a reasonable effort to perform duct sealing, but was unable to meet the reduction requirements; 150 CFM ₅₀ minimum reduction and 50% reduction, or greater <input type="checkbox"/> No test conducted, visual inspection verified ducts are inside conditioned space <input type="checkbox"/> Other: _____	

Duct Sealing:

Duct test required; 50% of cost, up to \$325 per gas heated residence; must have minimum 150 CFM₅₀ reduction **and** work must comply with PTCS specifications: (1) meet a minimum 50% reduction **or** (2) final CFM₅₀ must be less than 10% of conditioned floor space. PTCS form must be attached.

Pre CFM ₅₀ _____	Sealing Cost \$
Post CFM ₅₀ _____	
Leakage Reduction _____	

Gas Furnace/Heating Incentives

<input type="checkbox"/> Gas Furnace (\$100)* <i>(minimum 90% AFUE)</i>						<input type="checkbox"/> Gas Unit Heater (\$100) <i>(minimum 80% AFUE)</i>		<input type="checkbox"/> Gas Boiler (\$200) <i>(minimum 88% AFUE)</i>		<input type="checkbox"/> Gas Fireplace (\$100) <i>(minimum FE .65)</i>		<input type="checkbox"/> Gas Fireplace (\$150) <i>(minimum FE .70)</i>		<input type="checkbox"/> Gas Fireplace w/ Intermittent Pilot Light (+\$100)	
Manufacturer	Model #	Efficiency (%AFUE or FE)	%	ECM	<input type="checkbox"/> Yes <input type="checkbox"/> No										
Serial #	System Replaced	Installed Cost	Incentive Requested												

* Back up for heat pump excluded

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Water Heater Incentives

Manufacturer		Model #		Serial #		Energy Factor	
Installed Cost	Water Heater Capacity	Gallons	<input type="checkbox"/> Tankless	Water Heating Fuel*	<input type="checkbox"/> Electricity	<input type="checkbox"/> Natural gas	

* Water Heating fuel must be provided by NW Natural

Check the appropriate box to identify the incentive you are applying for.

Check Here	Incentive	Installer Requirements	Energy Requirements
<input type="checkbox"/>	\$ 35	Must be installed by a licensed Washington contractor	Gas tank water heater —Energy Factor of 0.62 or greater
<input type="checkbox"/>	\$ 150	Must be installed by a licensed Washington contractor	High-efficiency gas tank water heater —Energy Factor of 0.67 or greater with ENERGY STAR rating. ⁵
<input type="checkbox"/>	\$ 200	Must be installed by a licensed Washington contractor	Tankless gas water heater —Energy Factor of 0.80 or greater

⁵ Only a limited quantity of this incentive is available. Please call 1.866.311.1822 for more information.

Check the box to identify any bonus incentives.

<input type="checkbox"/>	\$ 150	Home Comfort Package (Attic, Floor, Wall Insulation and Air Sealing*)
<input type="checkbox"/>	\$ 100	Windows Bonus (Window + second qualifying upgrade*)

*For more information or for a list of qualifying measures, please visit www.energytrust.org/bonuspackage

Checklist for Incentive(s):

- Complete and return this entire form.
- Contractor and homeowner signatures are on terms and conditions page.
- Date of installation (all applications must be received within 90 days of initial measure installation).
- Invoice billing homeowner is attached and marked “paid in full”.
- Window incentive requires additional attachments. Please see window section above.

Terms and Conditions

APPLICATION: This application and any required additional documentation, including Data Sheets, must be filled out completely, truthfully and accurately. Participants are advised to retain a copy of this application and any accompanying documentation submitted to Energy Trust under this program. Energy Trust will not be responsible for lost documentation pertaining to this application request. **The Existing Homes program must receive applications within 90 days after the date of the first installation.** Funds for incentives are limited and may change. **Incentive amounts are valid through April 30, 2012. Please allow 6-8 weeks for incentive processing.**

ELIGIBILITY: Incentives are available to approved participants who are Washington residential natural gas service customers of NW Natural. Incentives for energy-saving measures that help save on the cost of home heating are available to NW Natural customers who heat their homes with natural gas. Final determination of eligibility shall rest solely with Energy Trust.

WORK QUALITY VERIFICATION: Prior to any payment of incentives, Participant’s contractor will verify that the installed energy-saving measures meet program requirements and Energy Trust of Oregon weatherization specification standards. Outdoor temperatures may affect this verification process. Participant’s home may also be selected for a quality control post-installation visit. No warranty is implied by this work quality verification.

PAYMENT: Incentives will be paid after: (i) completion and or installation of the energy-saving measures, (ii) verification of the completion and/or installation of the measures, and (iii) timely submission of all required documentation of measures. Incentives will be paid directly to Participant unless Participant has elected to obtain financing for the cost of installing the energy-saving measures identified in the documentation accompanying this application. For all improvements, with the exception of listed self-install upgrades, improvements must be installed by an Energy Trust trade ally contractor or any other WA licensed contractor.

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PROOF OF PURCHASE: The invoice documentation accompanying this application must itemize the products purchased and/or work performed. This proof of purchase must show: (1) the date of purchase and itemized price paid, (2) the size, type, make, model or part number for the products, (3) a description of any installation or other labor charges, and (4) the invoice is paid in full.

INCENTIVE AMOUNT: Incentives for energy-saving measures completed and/or installed as set forth in documentation accompanying this application are limited to the amounts provided by Home Energy Solutions. Such amounts are subject to change. Current incentive amounts are identified on the web at www.energytrust.org/washington. Contact Energy Trust with any questions.

TAX LIABILITY: Energy Trust is not responsible for any tax liability, which may be imposed on the Participant as a result of payment of any incentives or as a result of obtaining financing. Energy Trust is not providing tax advice, and any communication by Energy Trust is not intended or written to be used, and cannot be used, for the purpose of avoiding penalties under the Internal Revenue Code.

FACSIMILE/SCANNED: Facsimile transmission of any signed original document, and the retransmission of any signed facsimile transmission, shall be the same as delivery of the original signed document. Scanned original documents transmitted to Energy Trust as an attachment via electronic mail shall be the same as delivery of the original signed document. At the request of Energy Trust, Participant shall confirm documents with a facsimile transmitted signature or a scanned signature by providing the original document.

SAFETY AND BUILDING CODES: Participant represents that, with respect to the products and work performed identified in the documentation accompanying this application: (i) all products installed and work performed complies with all federal, state and local safety, building and environmental codes, and (ii) products are UL listed, if applicable, and installed per manufacturer's instructions.

NO ENDORSEMENT: Energy Trust does not endorse any particular manufacturer, contractor, or product in promoting Existing Homes. The fact that the names of particular manufacturers, contractors, products, or systems may appear on this application does not constitute an endorsement. Manufacturers, contractors, products or systems not mentioned are not implied to be unsuitable or defective in any way.

PROPERTY RIGHTS: Participant represents that Participant has the right to complete and/or install the energy-saving measures on the property on which those measures are completed and/or installed and that any necessary landlord's consent has been obtained.

ACCESS AND EVALUATION: Energy Trust and/or its representatives may request access to the property on which energy-saving measures have been completed and/or installed and may review and evaluate the project during and after completion. Participant agrees to provide reasonable access to the property for the purposes described herein.

ENERGY INFORMATION RELEASE: Participant authorizes Energy Trust to access energy usage data relating to the property on which energy-saving measures have been completed and/or installed by accessing the natural gas accounts at the physical address of the project. Participant agrees to provide other reasonable assistance to Energy Trust to obtain such information.

INFORMATION RELEASE: Participant agrees that Energy Trust may include Participant's name, Energy Trust services and resulting energy savings in reports or other documentation submitted to the Energy Trust Board of Directors, and/or Energy Trust's government overseers and relevant agencies administering energy programs. Energy Trust will treat all other Participant information gathered in evaluations as confidential and report it in Program evaluations only in the aggregate.

ELIGIBLE PRODUCTS: Products must meet Energy Trust energy efficiency specifications. These specifications may be found on the web at www.energytrust.org/washington and are subject to change. If you, or your contractor, are not sure of the specifications, please call Energy Trust before proceeding.

DISCLAIMER / NO LIABILITY: Participant understands that, while Energy Trust may provide Participant with an incentive payment, Energy Trust is not supervising work performed for Participant nor is Energy Trust responsible in any way for proper completion of that work or proper performance of any products purchased. Energy Trust is simply providing funding to assist Participant in implementing energy-saving measures. Participant assumes the risk of any loss or damage(s) that Participant may suffer in connection with installation of the measures. Energy Trust does not guarantee any particular energy-savings results by its approval of the application or by any other of its actions.

Participant Signature (All information is required to process incentive for payment.)

By signing below, Participant agrees to the terms and conditions of this application and authorizes Contractor to submit this application and all required invoices or measure documentation to Energy Trust on Participant's behalf for all Energy Trust incentives that are available for the energy-saving measures that Contractor has completed for Participant. By that authorization, Participant represents to Energy Trust that all measures have been completed satisfactorily as of the signature date below, and that any accompanying invoices or measure documentation are complete and accurate.

Participant Name <i>(please print)</i>	Signature	Date
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Would you like a complimentary work quality verification to confirm work has been completed to Energy Trust Standards?
Complimentary work quality verifications are dependent on available program resources.

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Contractor Signature (All information is required to process incentive for payment.)

By signing below, Trade Ally/Contractor certifies that this application and any accompanying invoices or measure documentation are complete and accurate, and that all measures associated with this incentive request were completed as of the signature date below. Incentives are payable to Participants only.

Trade Ally/Contractor Company		Install Date
Trade Ally/ Contractor Representative <i>(please print)</i>	Signature	Date
Telephone <input type="checkbox"/> Home <input type="checkbox"/> Cell <input type="checkbox"/> Office	Alt. Telephone	<input type="checkbox"/> Home <input type="checkbox"/> Cell <input type="checkbox"/> Office
Non-Trade Ally only Washington Contractor's License #		

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